SECTION 4.a

Proposed Configuration

➢ Sections 1 through 3 should be completed first!

OBJECTIVE:

The purpose of this section is to develop a proposed configuration of schools and sections for you district. More than one proposal may be created to handle different options the district would entertain based on changing schools to accommodate program related deficiencies.

INSTRUCTIONS:

Similar to Section 1.a Existing Building and Site Inventory, Section 4.a Proposed Configuration requires the revisiting of general school information, recorded under the "SCHOOLS" tab, and building "sections" under the "SECTIONS" tab. Different options for a districts configuration of schools will be accomplished by creating new Options.

"Options"

Create a new Option for each potential reconfiguration of district's schools and/or sections within schools. Upon creating each new Option, a copy of the original School and Section inventory data will be provided under the respective School and Section tabs.

"Schools"

- Edit School data including school name, description, address, configuration, total gross square footage, site acreage, building coverage, FES allowance, school type and grades housed.

Additional data required:

1. *Target Capacity*

   Assign the target capacity for the proposed school. The total of all schools target capacities should be set to equal or exceed the district wide enrollment projections based on utilization factors (90% for non-departmentalized/self-contained and team or departmentalized/dedicated teacher classrooms or 85% for teacher share classrooms) or district practices. If the district elects to make a change to the school's configuration to accommodate some re-allocation of sending areas, enrollment growth, change in grades housed etc. the target capacity should reflect such adjustments.

2. *FES Model and District Model*

   Assign the appropriate FES and District Model to the reconfigured school. If a district model developed does not fit the new configuration, a new model may be developed by revisiting Section 2.b, School Models.

3. *Scope of Work*

   Summarize the scope of work to be accomplished by changing the school's configuration.

"Sections"

- Edit Section data within schools including section name, description, building type, ownership, use, year constructed (applicable only if new section), stories and gross square footage.

SCHOOL and SECTION CONFIGURATION EXAMPLES:

- If a school is proposed to be changed from an existing middle school to an elementary/middle school, change the school type, grades assigned, and select the most appropriate FES model as well as district model.
- If the district elects to build a new school, create a new school record and enter all associated data. New sections (if appropriate) and new rooms will need to be created for the new school. If the new school will house some district services/activities, create a new section for non-instructional use with rooms, none of which will carry a student capacity.
- If the district wishes to demolish a school, delete the section records for that school. All rooms, support spaces, and fitout elements will be deleted beneath each section. Additionally, all building systems and system deficiencies will be deleted for this proposal. A deficiency identified as "demolition" will be created and used in Section 4.c Scope of Work.

  IMPORTANT NOTE: The building systems deficiencies inventoried in Section 3.b will remain as baseline data. Only the systems deficiencies associated with the demolished section (in this case deleted record) for the specific Option will be deleted.

- If a building section within a school is to be demolished, delete the section record and again all rooms, support spaces, fitout elements, building system deficiencies will be deleted since they would not be applicable if the section is demolished.
- If an addition is to be added to a school, adjust the total gross square footage, create a new section and enter in all section data ensuring that the sum of the gross square footages for all sections equals the gross square footage of the school.
- If a district is renovating a school with no changes to the school data and section data, no changes need to be made in this Section 4.a for this school. Renovations to rooms will be handled in Section 4.b.

SECTION 4.b

Proposed Rooms

➢ Section 4.a Proposed configuration must be completed first!

OBJECTIVE:

The purpose of this section is to modify the inventory existing rooms in each school thereby creating deficiencies which may be addressed in Projects in Section 4.c Scope of Work. Deficiencies created will address school program based modifications for any given Option selected. The proposed rooms will be modified for each Option created in Section 4.a. The Proposed Rooms Section will be used to generate:

- Deficiencies for renovation work to be addressed at the room level.
- Deficiencies to add room(s) to the proposed school.
- Deficiencies to demolish room(s) within a proposed school.
- Deficiencies to renovate, add or demolish support spaces connected to rooms
- Deficiencies to add fit-out elements associated with rooms

INSTRUCTIONS:

Section 4.b Proposed Rooms allows districts to adjust their room inventory to meet the needs of their proposed program space objectives. Data will be recorded in the "ROOMS," "SUPPORT SPACES," and "FIT-OUT" tabs on the LRFP Project Website in a format similar to 3.a Rooms Inventory. At each level, deficiencies will be identified and created specifically for that Option.

General

- Districts can make use of the updated floor plans gathered and used in Sections 1.a and 3. Additionally, school model reports will be useful in planning the proposed layout of rooms.

"Rooms"

- Complete for every room used by the school, organized by building section as defined in the "Building and Site Inventory", excluding areas included in the grossing factor (group toilet rooms, mechanical spaces, circulation, custodial spaces, general storage rooms, etc.). Similar room types with similar uses, square footage, and amenities can be grouped together for each building section as done in Section 3.a.
- Edit Room data for existing rooms including, room information, room size, and grades housed.

"Rooms Deficiencies"

For each room or set of rooms (as a single record) create a deficiency and correction that will address the proposed program objectives, for example renovations to existing rooms with no wall reconfiguration.

1. *Deficiency Name*

   Enter a deficiency name. It is recommended that a standard naming convention be adopted.

2. *Deficiency Description*

   Enter a deficiency description to further document the specific nature of the deficiency and correction for that room(s).

3. *Correction*

   Select one of the corrections offered from the drop down list:

   Demolition: Level 1 – Minimum Utility
   Demolition: Level II – Moderate Utility
   Demolition: Level III – Significant Utility
   New Construction: Level 1 – Minimum Utility
   New Construction: Level II – Moderate Utility
   New Construction: Level III – Significant Utility
   Program Renovation/No Wall Reconfiguration/Change In Use: Level I – Minimum Utility
   Program Renovation/No Wall Reconfiguration/Change In Use: Level I – Moderate Utility
   Program Renovation/No Wall Reconfiguration/Change In Use: Level I – Significant Utility
   Program Renovation/ Wall Reconfiguration/Change In Use: Level I – Minimum Utility
   Program Renovation/ Wall Reconfiguration/Change In Use: Level I – Moderate Utility
   Program Renovation/ Wall Reconfiguration/Change In Use: Level I – Significant Utility

4. *Quantity*

   Record the affected quantity of the corrected action.

5. *Repair Cost and Extended Cost*

   Each correction has a pre-specified standard unit cost based on square footage. The repair cost and extended construction cost (including construction soft costs) are automatically viewable in the Cost Model section of the room record (in yellow).

"Support Spaces"

Modify the support spaces inventory to address program objectives similar to Rooms records. Create a deficiency for each support space to address such modifications.

"Support Spaces Deficiencies"

For each support space(s) create a deficiency and correction that will address the proposed program objectives similar to the rooms deficiencies.

"Fit-out"

Adjust the inventory of Fit-out elements as with the rooms and support spaces.

ROOM, SUPPORT AND FITOUT EXAMPLES:

- In Section 3.a, Rooms Inventory, 10 identical classrooms were entered as one record. The proposal Option is to include Program Renovations/ No Wall Reconfiguration/Change In Use: Level I – Minimum Utility to 4 of the rooms, and Program Renovation/Wall Reconfiguration/Change In Use: Level II Moderate Utility to 3 other rooms. Two deficiencies would be created for the room record.
- If a room is going to be expanded but is part of a set of rooms in one record of the existing room inventory. Modify the existing room record by deducting on room of the similar rooms. Then create a new room record with similar data, entering the final net square footage (including the expanded section) and create a deficiency for New Construction of the total net square footage.
- If an existing room or set of rooms does not have the support spaces and/or fit-out elements desired by the district, create deficiencies under support spaces and fit-out. For example, a set of 10 general classrooms do not have data ports and it is desired to add 5 data ports for each room. Enter a deficiency under fit-out tab to add 50 data ports to that set of rooms (single room record). This deficiency may then be programmed into a project in Section 4.c Scope of Work.

SECTION 4.c

Scope of Work

➢ Section 4.a and 4.b must be completed first!

OBJECTIVE:

- The purpose of this section is to develop the district's selected Option into a Plan by creation of projects and scheduling projects into a Capital Plan, a.k.a Long Range Facilities Plan.

INSTRUCTIONS:

Section 4.c Scope of Work to create projects by aggregating deficiencies, associated with both facility condition as established in Section 3.c and program related deficiencies created in Sections 4.a and 4.b. These are to be created in a logical format with some general guidelines as follows:

- Group deficiencies by school so that DOE funding analysis can be accomplished on a school basis. Those projects ranging across multiple schools will be more difficult to analyze when considering eligible costs.
- Group deficiencies by state established Tiers as defined in S200 as follows:

  Tier I: health and safety, including electrical system upgrades; required early childhood education programs; unhoused students/class size reduction as required to meet the standards of the "Comprehensive Educational Improvement and Financing Act of 1996" P.L.1996, c.138 (C.18A:7F-1 et seq.);

  Tier II: educational adequacy – specialized instructional spaces, media centers, cafetoriums, and other non-general classroom spaces contained in the facilities efficiency standards; special education spaces to achieve the least restrictive environment;

  Tier III: technology projects; regionalization or consolidation projects;

  Tier IV; other local objectives

"OPTIONS"

From the Options created in Section 4.a, select one Option (Proposals Tab) and begin to create Projects for that Option. The deficiency data created in Sections 3.b, 4.a and 4.b will be copied and available as a set to select from for each Option. The original inventory data from these sections will not be deleted or edited in any manner and is available through entry into those sections.

"PROJECTS"

Create each Project by bundling deficiencies previously established. There is no limit to the number of projects that can be created. Projects can be logically developed specific to Tiers and by school, or they can cover a scope of work specific to the district's objectives. Each project created will only be included in the LRFP if implemented in the 5 year plan "Capital Planning" section to follow.

Project Properties Tab (Properties and Schedule)

Enter information including project name, ProjectID, project type, fund source, resources, description, and scheduling information such as start date, end date, completed data, and fiscal year. The scheduling information, like the properties data can be entered at any time when developing projects, and is most logically addressed when considering implementing the project into the 5 year plan.

Deficiencies Tab

Select deficiencies from list in the lower half of the page. These are all of the deficiencies recorded to date in the district.

IMPORTANT NOTE: The corrections for systems deficiencies may in some cases require a revision in cost due to impact from a program related deficiency. For example, consider the case where program renovations are planned for a group of rooms including moderate utilities and the facility condition deficiencies had been identified to replace the ceiling, flooring etc. for that section of the school. If the district plans to include both sets of deficiencies; the program related renovations for the specific rooms and the facility condition deficiencies for the section housing these rooms, then a deduction in the facility condition deficiencies would be required to exclude flooring and ceiling replacement addressed by the renovation. This would avoid "double dipping". Refer to the Line Items Tab below.

Line Items Tab

The Line Items Tab is used to adjust costs for any line item associated with a deficiency. In this case, the single line item per deficiency would be selected and adjusted accordingly. Sof for this example, I would select replace flooring and deduct the amount for the rooms being renovated from the Section cost.

Overhead Tab

Apply an overhead or multiple overheads for the project. Reminder: The standard unit costs used in the LRFP tool provide a basis for preliminary eligibility. The final approved costs will be determined at Project Application with DOE, therefore it is not necessary to attempt to adjust the overheads to align with actual estimated construction costs.

"ANALYSIS"

Use Analysis to find duplication of deficiencies across projects. The Deficiencies Tab provides another method of creating a project, similar to the Deficiencies Tab under projects.

Intersections Tab

The projects which have common deficiencies will be listed. By double clicking on the record, a view of the deficiency(ies) common to that two projects will appear. Deficiencies can then be excluded from one project or the other.

"CAPITAL PLAN"

Once all Projects have been developed with analysis and overheads complete, the next step is to schedule the projects into a Plan, specifically a Long Range Facilities Plan (termed Capital Plan on the website). Districts can move projects from year to year by either adjusting fiscal year in the Projects Properties tab, using the blue arrows or clicking and dragging in the Capital Plan schedule.